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**TO: Economic Support Supervisors
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Training Staff
Child Care Coordinators
W-2 Agencies**

**FROM: Amy Mendel-Clemens
Communications Section
Bureau of Health Care Eligibility**

BHCE/BWP OPERATIONS MEMO

No.: 03-11

Date: 02/21/2003

Non W-2 ☒ W-2 ☐ CC ☐

PRIORITY: HIGH

**SUBJECT: MEDICARE PREMIUM ASSISTANCE
(BUY-IN) DISCREPANCY CLEAN UP**

CROSS REFERENCE: Medicaid Eligibility Management Handbook, Appendix 27.0.0 and
Operations Memo [03-02](#): Medicare Premium Assistance (Buy-In)

EFFECTIVE DATE: Immediately

PURPOSE

The purpose of this Operations Memo is to request agency action to resolve the Medicare Premium Assistance (Buy-In) Discrepancy List by March 10, 2003. BHCE will distribute the list to the local agency CARES coordinators, who will give the list to the appropriate workers.

BACKGROUND

A change was implemented to the CARES/MMIS Interface on October 25, 2002, which ensures that the correct Medicare Buy-In information is sent from CARES to MMIS. It has been determined that about 2,000 recipients/participants have incorrect buy-in action flags (BAFs) and/or medical status codes remaining from previous periods of eligibility and manual updates. This clean up effort is underway to ensure that all individuals on MMIS reflect the correct level of Medicare Premium Assistance. In some cases this will mean that premium assistance on individuals who are not supposed to receive this benefit will be terminated.

AGENCY ACTION DEADLINE

Please review the listed individuals and complete any necessary actions to resolve the discrepancies ***no later than March 10, 2003***. This deadline will allow MMIS updates to occur prior to the March 17, 2003 monthly Medicare Buy-In cycle. If you take action after March 10, 2003, the individual may receive additional benefits in error or may have to wait an additional month to receive the correct Medicare Premium Assistance benefits.

NOTE ➤ If there has been a recent inter-agency transfer or worker reassignment, please forward the listing to the current agency/worker assigned to the case. Do not forward the list to agency 73 (SeniorCare – CAPO) because they only process SeniorCare eligibility and have no update authority for any other benefits.

MEDICARE PREMIUM ASSISTANCE (BUY-IN) DISCREPANCY LIST

The list identifies individuals that have discrepant or questionable Medicare Premium Assistance information on file at MMIS for the March 2003 benefit month. Individuals that have discrepancies for benefit months earlier than March 2003 are not included unless their March 2003 benefits are still in question. Most columns on the list are self-explanatory and come from MMIS. The 'CARES Info' column shows the open premium assistance for the individual as of February 6, 2003. This field is blank if there are no open premium assistance benefits in CARES.)If you need clarification of what to do to resolve these discrepancies please contact the CARES Help Desk for assistance after reviewing this memo.)

AGENCY ACTION

Compare the CARES information to the MMIS information for each individual on the report. Verify that a discrepancy still exists by looking at CARES and EDSNET. MMIS information is found on EDSNET screen RB and RE. No action is needed if the discrepancy has been resolved. If the discrepancy still exists, please take the appropriate action described in this memo.

Workers will want to put greater priority on processing items where MMIS shows premium assistance benefits while CARES does not (i.e., the list shows CARES Info is blank). These are cases where benefits may need to be terminated.

When CARES Info is (blank) and MMIS Info is BAF A, B, T or U:

Process using CARES to update MMIS: If you determine that the individual should be open for Qualified Medicare Beneficiary (QMB), Qualified Medicare Beneficiary for Nursing Home (QMBN), or Specified Low-Income Medicare Beneficiary (SLMB), process the necessary corrections in CARES to open and confirm the benefit following the policy guidelines in MAHB Appendix 27.0.0 Medicare Beneficiaries. This prompts CARES to send the open confirmed benefits including med. stat, the BAF, and the BAF date to MMIS.

Process using 3070 to update MMIS: If you determine that the individual should **not** be open for QMB, QMBN, or SLMB, then manually test for SLMB+ eligibility. (If you have recently tested the individual for SLMB+, you do not need to repeat the test). Do not test for ALMB Medicare Assistance program because it ended effective 12/31/2002. Complete a 3070 using the guidelines provided later in this memo and issue a manual notice to the client if needed. Update case comments to document your actions.

When CARES Info is QMB or QMBN and MMIS Info is NOT BAF A (or) CARES Info is SLB and MMIS Info is NOT BAF B:

Verify the benefit is correct in CARES. Workers may want to check DXSA to make sure that the client is still Medicare Part A and/or Part B eligible. Update any changes to AFMD.

Check if the individual is open for SeniorCare (SC) or Family Planning Waiver (FPW) in CARES.

If the individual is **not** open for SC or FPW, TRAN to MIMI using the listed PIN and press PF18. This prompts CARES to send MMIS the most recent and prior twelve months of open benefits, and will send the BAF and date to MMIS.

If the individual is open for SC or FPW, TRAN to SFEX, or SFED and confirm the open QMB, QMBN, or SLB benefits. This prompts CARES to send the current open benefits (SC or FPW) and the open QMB, QMBN, or SLB as the Buy-In Action Flag (BAF) and dates. (Note: PF18 on MIMI will not send any benefits to MMIS for periods when SC or FPW eligibility also exists for the individual.)

3070 OR E-3070 COMPLETION SPECIFIC TO BUY-IN CLEAN UP

A 3070 should only be used for resolving the discrepancies that cannot be resolved using CARES. Review the following examples and complete the update using the instructions that are most like your discrepancy. Remember, clients receiving any form of full-benefit MA do not qualify for SLMB+.

To Stop Buy-In when the med. stat and eligibility dates reflect 'other' benefits:

Example. Bert is eligible for SeniorCare. When AI, Bert's ES worker views MMIS, Bert has a med. stat of SC for SeniorCare and a BAF of A for QMB eligible. AI views CARES and verifies that Bert is not eligible for QMB, QMBN, nor SLMB in CARES. AI also verifies a previous manual determination that Bert is not eligible for SLMB+. AI should complete a 3070 to correct only the BAF to X on MMIS (eligibility for SC should not be changed). On the 3070 AI should enter a cert 3 BAF code X with BAF date. AI should leave the 3070 fields for med. stat and cert dates blank.

In addition to all the usual fields needed when completing a manual 3070 or e-3070 for an amended certification (Cert 3), fill in the following information:

1. Certification Action
Check box #3 for amended.
2. Case Number.
Enter the ten digit MA case number (this is the primary person's MAID found on CARES MIMI screen). Do not use the CARES Case Number or PIN on the 3070.
3. Medical Status Code and Period of Certification (Start and End Dates).
Leave the 'Medical Status' and 'Period of Certification' fields blank.

4. Buy-in Action Flag (BAF) and Date
Enter a BAF of X and enter the date in MMYYY format (i.e., 0103 for January 2003) for the last month that the premium assistance payment should have been made by the state.

To Stop BuyIn when the med. stat and eligibility dates are Premium Assistance only (e.g. med. stats QN,QR,QW,Q1 or SB)

Example. Bert is not eligible for Medicaid, SeniorCare or Medicare Premium Assistance. When AI, Bert's ES worker views MMIS, Bert has a med. stat of Q1 for SLMB+ and a BAF of A for QMB eligible. AI views CARES and verifies that Bert is not eligible for QMB, QMBN, nor SLMB in CARES. AI also verifies a previous manual determination that Bert is not eligible for SLMB+. AI should complete a 3070 to correct both the BAF to X and to end date the SLMB+ med. stat Q1 on MMIS. On the 3070 AI should enter a cert 4 with BAF code X, BAF date and a cancel date.

In addition to all the usual fields needed when completing a manual 3070 or e-3070 for a cancel certification (Cert 4), fill in the following information:

1. Certification Action
Check box #4 for cancel.
2. Case Number
Enter the ten digit MA case number (this is the primary person's MAID found on CARES MIMI screen). Do not use the CARES Case Number or PIN on the 3070.
3. Cancel Date
Enter the last day of the last premium assistance eligibility month using adverse action logic. (i.e., 03/31/03 if submitted to MMIS by March 10, 2003.
4. Buy-in Action Flag (BAF) and Date
Enter a BAF of X and enter the date in MMYYY format (i.e., 0303 for March 2003) for the last month that the premium assistance payment should be made by the state.

To Correct SLMB+ when the med. stat and eligibility dates are Premium Assistance only (e.g. med. stats QN,QR,QW,Q1 or SB)

Example. Bert is eligible for SLMB+. When AI, Bert's ES worker views MMIS, Bert has a med. stat of SB for SLMB and a BAF of B for SLMB eligible. AI views CARES and verifies that Bert is not eligible for SLMB in CARES. AI also verifies a previous manual determination that Bert is eligible for SLMB+. AI should complete a 3070 to correct both the BAF to U for SLMB+ eligible and the med. stat to Q1 for SLMB+ eligibility for the applicable dates on MMIS. On the 3070 AI should enter a cert 3 with BAF code U, BAF date of the date SLMB+ started, a med. stat of Q1 and appropriate cert dates.

In addition to all the usual fields needed when completing a manual 3070 or e-3070 for an amended certification (Cert 3), fill in the following information:

1. Certification Action
Check box #3 for amend.
2. Case Number.
Enter the ten digit MA case number (this is the primary person's MAID found on CARES MIMI screen). Do not use the CARES Case Number or PIN on the -3070.
3. Medical Status Code and Period of Certification (Start and End Dates).
Leave the 'Medical Status' and 'Period of Certification' fields blank, unless the information is not correct on EDSNET RE screen. If the medical status code is incorrect, enter a SLMB+ medical status code of Q1 and the correct Period of Certification dates to update.
4. Buy-in Action Flag (BAF) and Date
Enter a BAF of U and enter the date in MMY format (i.e., 0103 for January 2003) for first month that SLMB+ began.

To correct SLMB+ when the med. stat and eligibility dates are SC or FPW

Example. Bert is eligible for SeniorCare and SLMB+. When AI, Bert's ES worker views MMIS, Bert has a med. stat of SC for SeniorCare and a BAF of B for SLMB eligible. AI views CARES and verifies that Bert is not eligible for SLMB in CARES. AI also verifies a previous manual determination that Bert is eligible for SLMB+. AI should complete a 3070 to correct only the BAF to U for SLMB+ on MMIS. On the 3070 AI should enter a cert 3 with BAF code U and BAF date. AI should leave the med. stat and cert dates blank.

In addition to all the usual fields needed when completing a manual 3070 or e-3070 for an amended certification (Cert 3), fill in the following information:

1. Certification Action
Check box #3 for amend.
2. Case Number.
Enter the ten digit MA case number (this is the primary person's MAID found on CARES MIMI screen). Do not use the CARES Case Number or PIN on the 3070.
3. Medical Status Code and Period of Certification (Start and End Dates).
Leave the 'Medical Status' and 'Period of Certification' fields blank.
4. Buy-in Action Flag (BAF) and Date
Enter a BAF of U and enter the date in MMY format (i.e., 0103 for January 2003) for first month that SLMB+ began.

Send the completed 3070 through one of the following methods as soon as possible:

- Fax: (608) 221-8815
- E-mail: eds_3070@dhfs.state.wi.us.

These 3070s may be marked 'Urgent' for this clean up.

CONTACTS

BIMA CARES Information & Problem Resolution Center

Email: carpolcc@dwd.state.wi.us
Telephone: (608) 261-6317 (Option #1)
Fax: (608) 266-8358

Note: Email contacts are preferred. Thank you.

DHFS/DHCF/BHCE/MO